App. F. IX-4

1927.

File No. 59-27

Previous References

Serial Nos. 1-8

Later References

General and Revenue Secretariat.

Serial Nos.

Part B for

SUBJECT

Report of work done by Mr V. M. Appa-Doraiswami Mudaliar during the period of his deputation

D 1483-S dy 13.2.28

To Director of Ind. & Labour.

(iii) Superintendent Govt printing

Records the

General and Revenue Secretariat. Part File No. 59 of 1927.

Serial No.

Extract from file no Secl. 9.27.

I do not understand why the Appointment Mudaliar's report has not yet been sent. We cannot give too much attention to the study of markets for our silks. What are the points which should require attention to make our production acceptable to purchasers in N. India and what agencies should be employed for arranging for quick disposal at as good prices as can be got, should be indicated by Mr A. Mudaliar, and a knowledge of these requirements and facilities should be spread among producers. The Director may be asked to send up this report without delay.

Secl. M.N.K. 13.9.27

2 Ask Director to speed up the report

Secl N.R. 13.9.27.

3 Draft. Sd

KB. 17.9.27.

4 Issue Sd 17-9-27

Issued No 3031 dt 20.9.27

Letter no. Dy-328-27 dated 7th November 1927 from the Director of Industries forwarding the report of work done by Mr. V.M. Upadhyaya Mudaliar during the period of his tour in Northern India

Ors. to bill 15.10.27.

GEN. & REV. SECRETARIAT. 23 SEP. 1927 DEVELOPMENT BRANCH.

General and Revenue Secretariat. Seri File No. 59 of 1927.

Serial No.

5 Mr. Appadurai Mudaliar was requested to submit a report of his work in N. India with suggestions indicating the points requiring attention to make our silk acceptable to N. Indian Consumers, and the agencies to be employed for the quick disposal of our Stocks at good prices.

6 In regard to create a better market for our silks, Mr. Mudaliar says "we have not only to improve the quality of our silk and at the same time Sell our silk at Competitive prices

7 Kind attention is invited to pages 31+33 of his report setting forth the difficulties that beset the industry in Mysore and the steps to be taken to improve it.

8 Submitted for perusal and orders. Important points have been marked in red. Pp. 2012/27. [The Dir. recommends that arrangements be made for the removal of duty on silk imported into Hyderabad. This is for orders.]

9. The report is worth perusal & remarks in the first instance

WD 0324 -GPB-60,000-24-7-27

22/12 Sec. D

22/12

General and Revenue Secretariat. Seri File No. 59 of 1927.

Serial No.

10 The V.M. Apparaosharai Mudaliar has presented an interesting and valuable report, which, as embodying the results of a careful first hand study of the Indian market for silk, deserves to be printed as a departmental publication for. constant reference

11 The demand for coarse silk is confined to the Southern parts of India and stops with the Deccan. Even in this tract, this inferior grade has to struggle against the competition of cheap, but better reeled foreign silk, and (silk-substitutes

12 As we go north, there is practically no demand for the kind of silk reeled in village charkas. The weaving industry there requires an article of high "winding" quality, tenacity, uniformity and lustre, and therefore the demand is at present being met by imported silk from China & Japan. Ryot silk if reeled in a filature, or in Domestic Basins, compares quite favourably with the best foreign silks in these essential

General and Revenue Secretariat. No. of 192

Serial No.

qualities - and if we could so regulate our production as to place in the market large quantities of well reeled silk at competitive prices, there is no doubt that we can not only effect a lodgement but rapidly improve our position.

13 The Punjab, & the N.W. generally, seem to be within the sphere of influence of Kashmir - and I don't think we shd further annoy our strength by opening an expensive campaign there. Neither would I recommend local attempt counting for success Opposition by competing in Bengal with the languishing sericulture of that province. It would be best to start in a few well established centres such as Bombay, (for distribution), Surat, & Benares.

14 The main lines of action required is to increase and improve output, decrease cost by more efficient methods (seed, rearing, reeling) of production, and establish agencies for sale on a satisfactory basis. Detailed proposals as to

(We have to counteract, and gradually abolish, the unwholesome trade conditions in cocoons & silk which now obtain in Mysore

NOTE—Contn. sheet.

General and Revenue Secretariat. Seri File No. 59 of 1927.

Serial No.

how they can be achieved are contained on pp 33 & 34 of the report. I have marked in the report (1) to (7) proposals which I consider most essential

15 It is of vital importance that the Silk Association should be stimulated to vigorous life, and made an energetic influence in Mysore Sericulture The Dept unaided cannot do (except at an impracticable cost) much. The Appendices in Indian report may be sent to the Silk Association with a request that practical proposals might be formulated; and a generous measure of assistance may be extended by Govt to enable the Association to carry vigorous propaganda into the talukas.

16 In the meantime, the Dept may be asked to submit proposals as to the action that might be taken here

2d Member) 11/28

17 Action may be taken as suggested by the Dir, I&C, in regard to the duty on silk levied in Hyderabad

WD 0324—GPB—60,000—24-5-27

General and Revenue Secretariat. Seri. File No. 57 of 1927.

Serial No.

18 Mr. Appadorai Mudaliar's report is very interesting and it may be printed and copies circulated to Members of the Board of Industries & Commerce. A few copies may also be sent to the Silk Association.

19 A good deal of information relating to outside markets is given in the report and the problem is how to make use of it for the expansion of our sericulture. This problem requires unremitting attention on the part of an organization which can keep itself in ~~xxxxxx~~ intimate touch with production in all its branches and the market for it in and outside the State, and which will also constantly consider measures necessary for the healthy maintenance and expansion of this important industry. As observed by the Development Secretary, the Silk Association should function vigorously to achieve these objects, but it is yet in its initial stage and it has also been unfortunately deprived ~~of~~ for some time past of the lead and guidance of its President owing to his illness

20 It is necessary to take early steps to make the Association a forceful organization for improving sericulture in all its branches. It would be well to have the report considered by the Board of Industries & Commerce

WD 0324—GPB—60,000—24-5-27

erial No.

Commerce and it may be taken up at the next meeting. ~~after next.~~ If the Board considers it advisable, it might appoint a committee of its own to give constant attention to sericultural problems and all points arising out of Mr. Appadorai Mudaliar's Report may be considered one by one by that committee and the course of action to be taken in respect of them settled in consultation with the Silk Association.

21 I do not think any action can be taken on the proposal to address the Government of Hyderabad to forego ~~remove~~ the five per cent. duty on imports of silk into that State. It is difficult to see what arguments we can urge to support our request. That Government will lose revenue by adopting such a step and if it does not care to do so in the interests of its weaving industry, I do not think we can persuade it to adopt this measure. The position will however be different if the Expert Committee on Indian States considers the question of removing the barriers created by land customs imposed under the policy adopted by some of the State Governments in India.

22. From what Mr. Appadorai Mudaliar states our silk does not appear to have much chance

General and Revenue Secretariat. Seri. File No.

Serial No.

outside unless its price is reduced, and the Sericultural Department should pay special attention to organise measures to enable our local production to compete successfully with its rivals in and outside the State.

DEWAN'S OFFICE.
Received on
17. JAN. 1928
Reg. No. 1142

General and Revenue Secretariat. Serial File No. 59 of 1927.

Serial No.	
2	G. O. No. 0.8483-5 Secy. Bd 13.2.1928 to Govt. Dept, Secy. E.C. & Supdt. G. Branch. Records the report of Mov. M. Appa Dhorai mentalia and requests that it may be considered at an early meeting of the Board of
3	Letter no 0.8483/28 13.2.28 to the Govt. Dept. stating that Govt. do not consider it practicable to take any action in the matter of the Hyderabad Govt. having agreed to forego the import duty on silk levied by that Govt. and requests to take effective steps to reduce the cost of production of local silk.

BOARD'S SECRETARIAT
18 FEB. 1928
DEVELOPMENT BRANCH

SUBJECT..... .....

.....

.....

Section Secr

File No. 2-26

Serial No. R.

Diary No. of letter replied to . .

No. D. 3013 & 7917

Immediate

General and Revenue Secretariat

( )

the *192*

To

The Director of ...

Sir,

Date of issue 30-8-27

Signed by

A

I am directed to ... your attention to G.O. No. D.7922 Secr. 2-26 S & 16th March 1927 sanctioning the deputation of V.M. Appasamiar Mudaliar to N. India, and to request that his report of work done by him during his period of deputation may be sent with ... delay. The report should indicate the points requiring attention make our self recommendations

over

List of enclosures.....

Copied by.....

Examined by .....

capable to purchasers in N. India

and the agencies shown the employer

for arranging for quick disposal. give them

as high price as possible

TELEGRAPHIC ADDRESS :— "INDUSCOM."

In reply please refer to
No. D4-328-27

GOVERNMENT OF MYSORE.

DEPARTMENT OF INDUSTRIES AND COMMERCE.

OFFICE OF THE DIRECTOR,

Dated Bangalore, the 6th November *192* 7.

FROM

C. RANGANATHA RAO SAHIB, ESQ., B.A., B.L.,
Director of Industries and Commerce in Mysore,
(Bangalore India.)

D. 5119
REV. SECRETARIAT, GEN.
14 DEC. 1927
DEVELOPMENT BRANCH.

To

N. RAMA RAO, ESQ., B.A., B.L.,
SECRETARY TO THE GOVERNMENT OF MYSORE,
DEVELOPMENT DEPARTMENTS, BANGALORE.

SIR,

Seri 59-27-1

With reference to your letter No.D.3013/Seri.2-26 dated the 20th September 1927, I have the honor to forward herewith a copy of the report on the enquiries made by Mr.V.M.Appadore Mudaliar in regard to the market for silk in Northern India during his deputation. A brief summary of the Report is also enclosed.

I beg to invite reference to page 7 of the report giving the statistics of the total consumption of our silk in Hyderabad State from 1920 to 1926. The average consumption for the last three years is a little over 22 lakhs of rupees. It is reported that the merchants of Hyderabad estimate that the proportion of Mysore silk consumed in the State is about 50 to 60 per cent of the total imports into the State. The Hyderabad Government levies an import duty of 5% on the silk coming into the State. I have the honor to suggest that Government may be moved to address the Hyderabad Government to remit the duty on silk imported from Mysore and other Indian States.

A separate report will be submitted in regard to the other matters dealt with in the report.

I have the honor to be,
Sir,
Your most obedient servant,

C Ranganatha Rao Sahib

DIRECTOR.

INDUSCOM'

Codes used—A.B.C., 5th Edn., Bentleys.

GOVERNMENT OF MYSORE.

Department of Industries and Commerce.

D. O. No.
B-27-28

Mr. C. RANGANATHA RAO SAHIB, B.A., B.L.,
Director.

OFFICE OF THE DIRECTOR,

Bangalore, dated the 2nd March *192* 8.

GEN. & REV. SECRETARIAT
7413.
2-[illegible] 1928
DEVELOPMENT BRANCH.

Dear Mr. Vedavyasachar,

Please write. I shall thank you if you can kindly send me a copy of the report regarding the deputation of Mr. V. M. Appadore Mudaliar to Northern India sent to your office with this office letter No. D4-328/27-28 of the 7th Novr. 1927. This is required for perusal of the 2nd Member of Council.

2/3/28

Thanking you,

Yours sincerely,

Ranganatha Rao

+ of the report
+ return for reference
+ return Yours &
D.O. letter 2/3/28

V. Vedavyasacharya, Esq., B.A.,
Assistant Secretary to Government,
Development Departments, Bangalore.

DEVELOPMENT
3 - MAR 1928
DEV. & REV. SECRETARIAT

A Brief Summary of the report of Mr. V.M. Appadhorai Mudaliar regarding his tour in Northern India for creating market facilities for Mysore silk.

****

Period of deputation - 11th May 1927 to 15th July 1927.

Places visited. - (1) In Hyderabad State - Secunderabad, Sangareddi, Aurangabad; (2) In Bombay Presidency - Gadag, Hubli, Belgaum, Bangli, Poona, Bombay, Surat, Ahmedabad; (3) In Baroda State - Baroda; (4) In Punjab - Lahore, Amritsar, Ludhiana; (5) In United Provinces - Meerut, Delhi, Agra, Allahabad, Benares; (6) In Bihar and Orissa - Patna; (7) In Bengal - Calcutta; (8) In Madras Presidency - Peddapur, Rajahmundry, Madras.

Work done in each place. -

1. Hyderabad (Deccan) - Visited Sangareddi. Annual consumption 15 to 16 thousand lbs. Mysore silk from country charkas used. Kempanahalli, Chikkaballapur, Dhangur, Closepet, Nandi, and Channapatna silks in demand. Complaints re' ununiformity of thread, presence of floss and wastes in silk.
   60/70 denier domestic unit silk may find favour.
2. Secunderabad - 30,000 lbs. silk consumed. Only 12,000 lbs. from Mysore. Rest Chinese. Very little artificial silk used. Chinese silk cheaper Rs 6/- to Rs 6/12 per seer while Mysore silk sold at Rs 7/- to Rs 7/8 per seer. There is field for popularising domestic unit silk.
3. Aurangabad - 100 looms. 4,000 lbs. of silk used annually. Low grade Chinese and Bengal twisted silk used. Mysore silk is said to be costly.
   There is scope for introducing twisted domestic unit silk. Artificial silk used to some extent to lessen cost of finished goods.

Hyderabad(Deccan) consumes about 21,01,706 rupees worth of silk annually. Of this only 60 per cent is from Mysore and only 3 per cent artificial silk. The Nizam's Government impose an octroi duty of 5 per cent ad valorem on all the raw silk imported into the Dominion.

Bombay Presidency. -1.Gadag - One lakh of lbs. of silk used.

GEN. & REV. DEPARTMENT
3 - MAR 1928
DEVELOPMENT

~~25,000~~ 2,500 looms. Pit looms. 95 per cent of silk is from Mysore country charkas. Sidlaghatta, Chikkaballapur, Melur, Vadigenahalli, Devanahalli, and Channapatna silks used. Artificial silk hated. Chinese silk purchased when Mysore silk is costly. Mysore silk reported to be popular as it takes all shades of colour well and as the finish also is better than Chinese silk.

Hubli. - 14,000 pit looms. 90,000 lbs. of silk used annually. 50 per cent silk is from Mysore country charkas. Sidlaghatta and Chikkaballapur. 15 per cent from Janghipur (Bengal), rest Chinese. 25 per cent artificial silk used. This consumption is increasing.

Ruling prices. - Mysore silk - Rs 9/- to Rs 9/12 per lb.
Bengal silk - Rs 11/- to Rs 12/8 per lb.
Artificial silk - Rs 1/12 to Rs 2/8 per lb.

16/20, 18/22, 28/30, and 40/45 denier domestic unit silk may be popularised.

H.G. Divte and Sons, Hubli, willing to act as agents for high grade Mysore silk.

Belgaum. - Shahapur is the weaving and distributing centre for twisted and dyed yarn. 5,000 pit looms. 18 to 20 lakhs of rupees worth of silk consumed annually. 50 per cent from Mysore country charkas. This is gradually increasing since 1924. Kempanahalli, Thimmasandra, Muduvadi, and Sidlaghatta silks in demand. China and Bengal silk also used. No artificial silk.

Prevailing rates. - Mysore silk - Rs 10/8 to Rs 13/8 per lb.
Bengal silk - Rs 10/- to Rs 13/- per lb.
Inferior China - Rs 7/- to Rs 9/- per lb.
Superior China - Rs 10/- to Rs 11/- per lb.

Mysore silk reported costly. Filature silk introduced by Messrs. Narasingasa Shalagar Narayan Naik and Co. who hav throwing mill in Bangalore. Filature silk finds a ready sale if the same is sold at the rates paid to Chinese Steam Filature silk

Sangli - There is demand for 28/30, 40/45 denier filature and domestic unit silk for the 24 power looms owned by Mr.

Vishnupanth

DEVELOPMENT BRANCH
3 - MAR 1928
AGR. & RURAL DEPT. SECRETARIAT

Vishnupanth who is getting now twisted silk from Narasingasa Shalagar and Co. of Bangalore,

Poona - 1,500 looms. 2 lakhs of rupees worth of inferior grades of Mysore and Chinese twisted silk used. Artificial silk is being consumed largely. 90 per cent raw silk is Chinese. Gold-thread factories require Mysore filature silk, twisted and ready for the loom. Percentage of loss in boiling off is reported greater in Mysore silk than in China silk. Country charka silk also is required as also 60/70 denier filature twisted silk. Spun silk also used largely.

Bombay, - Chief distributing centre for imported silks such as raw and twisted silk from China and spun and raw silk from Japan Chief importers- Messrs. Nagindas Foolchand Chinai & Co., 50 to 60 lakhs rupees worth of silk imported annually.

Messrs. Sir. Currimbhay Ibrahim and Co. and others. - 70 to 80 lakhs of rupees worth of silk imported annually.

Only 5 per cent of the imported stuff is of superior quality. Messrs. Nagindas Foolchand Chinai and Co. import silk from Shanghai, Canton, Hongkong and Cochin China. Superior silks are consumed in Surat and Benares for gold-thread. Mysore filature silk may be sold if prices are similar to No. 1 Shanghai steam filature. Charka silk may find a sale if the same is re-reeled and graded up. This firm suggests that we should prohibit the export of cocoons, should have control over cocoon prices, should increase the production of cocoons and should popularise domestic basins. They say that the American demand for China silks and the exchange rates govern the fluctuations in the price of raw silk from China.

Surat. - 5,000 power looms and 4,000 improved pit looms.

Annual consumption - Rs 50 to 60 lakhs worth of raw silk.
Rs 25/- to Rs 30 lakhs worth of artificial silk. The consumption of rayon is on the increase during the last 4 or 5 years.

About 90 per cent of the silk consumed is high grade steam filature silk from China. Kashmir silk has just made its appearance.

3 - MAR 1928

Prevailing rates. - China silk - Rs 10/12 per lb.
Artificial silk- Rs 2/- per lb.

Mysore silk purchased if rates are favourable.

There is great possibility of introducing filature and domestic unit silk for use in the power looms if the rates are favourable

Ahmedabad. - 400 looms. 5,000 lbs. of silk per year.

Rates - Canton silk - Rs 11/8 per lb.
Shanghai white - Rs 13/- per lb.
" yellow - Rs 12/4 per lb.

Filature and domestic unit silk of 16/20, 24/26, 40/45, and 90/110 may be popular.

The Punjab. - In Amritsar, Ludhiana, Meerut, and Delhi, mostly Kashmir silk is used. Spun silk very much popular. Artificial silk gradually losing ground. Coarser sized country charka silk from Sidlaghatta and Closepet is used largely in Delhi. Kothand ramsa and Ramaswamisa of Chickpet, Bangalore City send this silk to Delhi.

Agra. - Coarser sized 55/60 denier white silk is popular.

Benares. - Kashmir silk is gaining ground. 25 per cent of silk used is Chinese, 25 per cent Kashmir, 35 per cent Bengal, and 15 per cer Japanese. 30,000 looms.

Prevailing rates. - June 1927.	Kashmir -	28/32 denier	- Rs 12/12 per lb.
	Bengal -	do	- Rs 13/10 per lb.
	Mysore -		- Rs 13/12 to Rs 14/ per lb.

Finer sizes are required in Benares.

Bihar and Orissa. - Bhagalpur - 7,000 to 8,000 looms. Mostly Italian spun silk, Tassar silk and artificial silk used.

Bengal. - Preference is given to Bengal silk.

Madras. - Peddapur. - There is a weaving factory which has received a loan from Madras Government. Rs 30,000/- worth of silk used every month. There are 310 improved looms.

Prices of silk July 1927. - Canton silk - About Rs 11/4 per lb.
Shanghai silk - About Rs 11/6 per lb.
Mysore filature silk. - Rs 14/- per lb.

This factory may be induced to go in for twisted filature or domestic unit silk if the prices compare favourably with Chinese silks.

GEN. & REV. SECRETARIAT
3 - MAR 1928
DEVELOPMENT BRANCH

In Rajahmundry inferior grades of Chinese silks are used while in Madras cheap Mysore and Chinese silks are used.

Summary.

Silk reeled in country charkas can be popularised in places where pit looms are still in use. Gadag, Hubli, Belgaum, and Poona. Further north, country charka silk can be made popular if the reeling is improved and the silk is made free from the existing defects, such as loose ends, floss, waste, and un-uniformity.

Filature and domestic unit silk will find ready sale if the price compare favourably with Chinese and Kashmir and Bengal silks.

To bring down the cost of silk, some control should be had on the cocoon markets, grading up of cocoons should be attempted, and the use of reliable cocoon weighing scales should be encouraged.

To improve the quality of silk produced, propaganda work should be done among the reelers to put on the market silks free from defects, re-reeling should be encouraged, some amount of grading up of silk to be done and the use of domestic units encouraged.

The establishing of a conditioning house to test and certify the quality of silk exported from Mysore would go a long way to assure the customers re' the quality of silk they purchase.

Reliable agents and correspondents may be appointed in likely centres such as Gadag, Hubli, Surat, Benares to popularise Mysore silks and keep us informed about the prevailing markets rates.

An attempt to be made to induce the Nizam's Government not to levy octroi duty on Mysore silk imported to the Nizam's Dominions.

Filature and domestic unit silk should be sent to centres where power looms are working, sending twisted silk wherever there is demand for the same.

H. S. Lewis

Superintendent of Sericulture.

GEN. & REV. SECRETARIAT
3 - MAR 1928
DEVELOPMENT BRANCH

REPORT OF WORK DONE BY THE ASSISTANT SUPERINTENDENT OF SERICULTURE IN CHARGE OF FILATURE DURING HIS DEPUTATION TO NORTHERN INDIA & OTHER PLACES.

Before giving details of my tour in Northern India and submitting proposals to secure business relations for Mysore silk in those parts it is necessary for me to mention as to how the idea started and how the necessity for a tour in Northern India was felt. From the experience gained in Mysore Filature in exporting silk to France the then Superintendent of Sericulture in Mysore had come to the conclusion that exports of silk to Europe would be at any time a risky job due to fluctuations in prices of silk, sudden and unfavourable rates of exchange, heavy insurance and freightage charges at the consignee's cost, commission to the selling agents and above all the unusual delay in the receipt of money by the sale of silk in France.

To overcome these difficulties the Superintendent suggested to Government, ways and means to create market facilities in India. It is a known fact that a very large quantity of silk is being imported to India from China (in addition to that of Kashmir and Bengal silks) mostly for the use of high class fabrics. When India is in need of silks of superior quality, it is but right that Mysore with its ideal climatic conditions for sericulture should increase her out-put and try to meet India's demand, thereby diminishing gradually the import of foreign silks. With this object in view a proposal was submitted to Government in 1924 by Mr. N. Rama Rao, the then Superintendent of Sericulture in Mysore pointing out the past experience gained in the exportation of silk to France and the importance of a thorough investigation in all the important silk consuming centres in the Northern and for creating satisfactory business relations in India. This proposal owing to some reason or other was some how put off from time to time. In 1927 Government decided to depute an Officer for this purpose. Due to some important changes in the Department early in 1927 and the appointment of Mr. N. Rama Rao as Secretary, Development Departments and quite unexpected as I was, the Government

were

GEN. & REV. SECRETARIAT 3 - MAR 1928 DEVELOPMENT

(1)

were pleased to sanction my deputation to Northern India in their order No. 8.7925-7/Ser. 2-26-6 dated 16/22 March 1927 and it was a problem for me as to how far I could do justice for the selection made. In the mean-time realising the importance of such an investigation to be undertaken by Government, one Mr. Narayana Rao Naik, Managing Partners of Messrs. Narasingasa Shalagar Narain Naik Co., of Bangalore who have recently started a silk twisting factory with up-to-date throwing plant also availed the opportunity and decided to accompany me in my tours.

PERIOD AND COMMENCEMENT OF TOUR. -

Though I left Mysore on the 11 th May 1927 with a representative collections of samples of silk, it was possible for me to leave Bangalore on the 14th with necessary letters of introduction kindly given to me by the Director of Industries and Commerce in Mysore to all the Directors of Industries and Commerce concerned (such as, Hyderabad, Baroda, Bombay, the Punjab, United Provinces, Bihar and Orissa, Bengal, and Madras) besides three more letters to the Textile Expert to the Government of Madras, (Mr.) Seth Narotham Moorarji of Bombay, and Mr. C. Krishnaswami Rao Sahib, Sales Officer, Mysore Iron Works, Bombay. Including 12½ days time spent in journey, I was able to complete my tour within two months and reached Bangalore on 13-7-1927.

PLACES VISITED. -

During this period I have visited all the places proposed by the Director ~~of~~ in addition to those already approved by Government with the ~~exception~~ exception of Jhansi and Berhampur (Bengal). From enquiry I learnt that Jhansi is not at all a silk consuming centre and Berhampur I had to give up as the Director of Industries and Commerce in Bengal gave me to understand that Berhampur is more after their own silk and the proprietors of reeling establishment there may not like to have another competitor in the field. Instead of these two places I visited 5 more new centres such as Sangareddi in Hyderabad State, Sangli on my way to Poona from

Belgaum

GEN. & REV. SECRETARIAT. 3 - MAR 1928 DEVELOPMENT BRANCH

Belgaum, Ludhiana in the Punjab and Meerut in the United Provinces on my way to Delhi from Amritsar and Peddapur 3 miles from Samalkote Railway Station on my way to Rajahmundry from Calcutta. The following is the complete list of the places visited:-

In Hyderabad State.

(1) Secunderabad.
(2) Sangareddi.
(3) Aurangabad.

In Bombay Presidency.

(4) Gadag.
(5) Hubli.
(6) Belgaum.
(7) Sangli.
(8) Poona.
(9) Bombay.
(10) Surat.
(11) Ahmedabad.

In Baroda State.

(12) Baroda.

In Punjab.

(13) Lahore.
(14) Amritsar.
(15) Ludhiana.

In United Provinces.

(16) Meerut.
(17) Delhi.
(18) Agra.
(19) Allahabad.
(20) Benares.

In Bihar and Orissa.

(21) Patna.

In Bengal.

(22) Calcutta.

Madras Presidency.

(23) Peddapur.
(24) Rajahmundry.
(25) Madras.

Hyderabad State. - Warangal, Armour, Godwal, Narayanpet, Pyton, Secunderabad, Sangareddi, and Aurangabad are very important weaving centres in Hyderabad State, Out of these places I was able to visit only Secunderabad, Sangareddi, and Aurangabad. The Directors of Industries and Commerce and of Agriculture were kind enough to render all help during my visit to these places.

Sangareddy.

GEN. & REV. SECRETARIAT
3 - MAR 1928
DEVELOPMENT BRANCH

Sangareddi. - The Superintendent of Sericulture, Hyderabad accompanied me to this place and introduced me to the weavers there. The Director of Industries and Commerce introduced me to the Secretary, Chamber of Commerce in Hyderabad, who in turn introduced me to all the leading silk merchants and weavers at Secunderabad.

Sangareddi. - The weaving industry is entirely under the hands of a few leading Indian Weavers with 26 pit looms under their control; and other small weavers in that place depend on them for the supply of silk required for their use. They always use Mysore Country Charka Silk and purchase the quantity required from Bangalore direct and not through the merchants at Secunderabad. Only in rare cases when the prices of Mysore silk is high they go in for Chinese inferior silks, such as "Minghew" and "Kobung" from Bombay. This place is noted for coloured silk kerchiefs, called dusti, silk shervanis. Mahomedans gents use this for their long coats and other miscellaneous fabrics required for the use of gosha ladies.

These weavers complained of the quality of silk not being uniform and full of floss, etc., and at the same time they have also admitted the good points in our silk. In their experience they say that the percentage of loss in degumming is not much when compared to other inferior grades of China silk, and in point of elasticity, tenacity and lustre our silk is decidedly superior to inferior grades of Chinese Silks. Total quantity of silk consumed per annum is according to their figures is between 15 to 16 thousand lbs. The weavers of the place particularly like silk reeled in Kempanahalli, Chikkaballapur, Sidlaghatta, Dhangur, Closepet, Nandi, and Channapatna Fort silks.

When the defects were pointed out by them, I showed them the difference between Country Charka Silk and Domestic Basin Silk and wanted them to try Domestic Basin Silk in their looms. They were convinced and wanted to try in their looms with country charka silk and domestic basin silk in weaving saries and shervanis to find out working cost of both and at what price they could market these goods. They have also promised to give details of working cost for both. The probable size they require is 60/70 denier. The Superintendent

of

of Sericulture, Hyderabad is also interested in their experiment and promised to supervise the work and give us all details connected with this experiment.

Secunderabad. - In Secunderabad I met the leading merchants and in their opinion they think that the average annual consumption of raw silk is about 30,000 lbs. and out of this at least 10,000 to 12,000 lbs. of silk is from Mysore State and the rest is of inferior grades of Chinese Yellow Silk. The consumption of Chinese silks is in different grades and some of the popular chop marks are "Minehow", "Kobung", "Wying", etc. The prices of Mysore silk at which they purchase is between Rs 7/- to Rs 7/8 per seer of 28 tolas and Chinese silks is from Rs 6/- to Rs 6/12 per seer. Minehow, Kobung, and Ektar is largely used. Chinese silks are received in bundles of 150 lbs, for each bundle or bale. Ektar single twist 3½ lbs. in each book and some chops of ~~xxxxx~~ yellow silks are also received in 3 lb. bundles. The average rate is Rs 30/- per 120 tolas.

The average rate at which they purchase single twist white Chinese silk Ektar is Rs 45/- for 120 tolas. Artificial silk is rarely used in Secunderabad and in their opinion they think, total quantity ~~of artificial silk~~ consumed is not even 1/16 of the total quantity of natural silk consumed. They like Mysore silk and their ambition is to use all Mysore silk and they are obliged to go in for Chinese silk and consume major quantity of it because it is cheaper to them.

One of the merchants when he saw the samples of our domestic basin silk wanted to induce his clients to try in their looms and placed an order for 4 lbs. of silk in size 28/3, 40/45, 60/65, and 70/75 at a concession rate.

Aurangabad. - Total number of looms in this place is very limited. I learn that there are about 100 looms distributed among very few weavers. This place is particularly famous for the manufacture of Mushru, Hemru, and Kinkab.

The manufacture of Mushru is with an admixture of silk, cotton, and lace of various gaudy designs used more by Mahomedans ladies and Hemru is used by Mahomedan gents as shervanis (for long coats)

and kinkab is more meant for the use of children with gaudy colours. Kinkab is also used for decorative purposes by Nawabs and Noblemen of Hyderabad State. The manufacturers here use more of inferior grades of China and Bengal twisted silks and if they were to take to Mysore Silk they may require only twisted silk ready for use.

The samples of our raw silk as well as twisted silk were shown to the weavers here and they appreciated the quality. As they are in the habit of using only inferior grades of twisted silk, our prices seem to them rather high. In spite of that one of the weavers wanted to try our Domestic Basin twisted silk and wanted Mr. Narayana Rao Naik to specially prepare and send him 2 lbs. of twisted silk with detailed instructions regarding twists, etc.

The local term for the preparation of warp is called "Lozee" and he wanted this Lozee to be prepared by taking 20 single threads twisted and 4 of these threads to be retwisted again, i.e., the thickness of the thread twisted should comprise of 20 x 2 x 4 or 160 threads for a Lozee. Such 20 Lozees of 3,200 threads to make one warp and the length of this should not exceed 34 yards both at the top and at every 3½ yards this warp must have two crosses. Mr. Narayana Rao Naik took a sample kilcha from him to prepare the thread according to the requirements with a promise to send the required quantity after return to Bangalore.

Total consumption of silk when compared to other weaving centres in Hyderabad State is not much and they approximately estimate between 30 to 40 maunds of twisted silk (local maund is equal to 40 seers, one seer is equal to 80 tolas, works out to 3,000 to 4,000 lbs.). Of late they have also commenced to use artificial silk for Mushru in order to reduce their cost of manufacture and market their goods at cheaper rates and thereby effect a rapid sale of the goods manufactured. Some of the local terms used in the weaving industry here are as follows:-

(1) Twisted silk	-	Kuthani.
(2) Bleaching	-	Gokar.
(3) Dyeing.	-	Rangna.
(4) Warp	-	Thana.
(5) Weft.	-	Vana.
(6) Cross	-	Jog.

The total consumption of silk among the places visited:-

(1) Sangareddi about . 3,500 lbs.
(2) Secunderabad about - 30,000 lbs.
(3) Aurangabad about - 3,000 lbs.

T o t a l. 36,500 lbs.

I learn the remaining weaving centres like Armour, Warangal, Gadwal, Narayanapet, and Pyton consume a very large quantity of silk. The Superintendent of Sericulture, Hyderabad was kind enough to give me the total consumption of silk in Hyderabad State for the last 6 years, i.e. from 1920 to 1926 (figures collected by him from the Customs Department);

1920-1921	- Rs 14,74,422/-.	
1921-22	- Rs 22,24,988/-.	
1922-23	- Rs 24,50,714/-.	In O.S.
1923-24	- Rs 24,52,195/-.	
1924-25	- Rs 20,48,919/-.	
1925-26	- Rs 19,59,000/-.	

Or a total consumption of silk for these 6 years is Rs 1,26,10,238/- in Hyderabad Coin. The value of an O.S. may be taken at 14 annas in B.G. and import duty of 5% is levied on the total amount of silk imported.

The Superintendent of Sericulture thinks that nearly 90% of the silk consumed is from our State; but the merchants from whom I collected information estimate it to be between 50 to 60 %. The per centage of artificial silk consumed when compared to natural silk is not even 3 %.

BOMBAY PRESIDENCY. -

Gadag. - Bettigere in Gadag is a mile and a half from Gadag is an important centre for the manufacture of Ilkal pattern saries and kanams and the population of this place is about 14,000; the class of people engaged in this industry is I believe Putwegars or otherwise called Bavagar Kshatrias; each and every house in this place can boast of few pit looms. The total number of looms in Bettigere is about 2,500; and Gadag with a population of about 26,000 has only 300 looms. But the people in Gadag are mostly engaged in twisting silk required for other weaving centres and I learn that nearly 40 % of them are engaged in this work.

Weavers in this place are from the very beginning using only

Mysore silk and the important men from whom I have gathered information estimate that nearly 95% of the silk consumed is all country charka silk from our State and the rest is cheap Chinese silk, Sidlaghatta, Chikkaballapur, Melur, Vadigenahalli, Devanahalli, and Channapatna are the chief centres from where they obtain their supply of raw silk. The annual consumption of country charka silk is between 90,000 to 1,10,000 lbs. taking at an average cost of Rs 10/- per lb. works out between Rs 10,00,000 to Rs 11,00,000/-

Weavers here have got an aversion for the use of artificial silk. Even when the ruling rates for Mysore silk is highly high and Chinese silk at low price, they would prefer Mysore silk and not Chinese. Only when the rates are exceptionally high for Mysore silk, they would resort to Chinese silk in small quantities just to keep their looms engaged. This clearly shows the good qualities in our silk.

One Mr. Kabadi, Honorary Magistrate and Silk Sady Merchant thinks that Chinese silk does not take in dyeing green colour very well and gives an imperfect finish, but they do take yellow dye quite alright. White Chinese silks give better lustre when dyed; whereas, Mysore silk takes in all shades quite alright and gives a better finish. We do not as a rule use artificial silk, because, we know it is not lasting like natural silk. We always go in for Mysore silk for the manufacture of Bettigere saries or otherwise called Ilkal pattern saries.

Hubli. - Hubli is another important centre for the manufacture of these ilkal pattern saries and kanams and this place is said to contain 14,000 pit looms. The saries manufactured here finds a large sale all over Kharwar District, Bangalore, Shimoga, and all over Bombay Presidency. The usual size of saries is 16 cubits x 48". These saries are mostly used by the Saraswat Brahmins who are particularly fond of this kind of saries and kanams. Hubli consumes about 7500 lbs. of silk per month or per annum 90,000 lbs. of both country charka, Bengal Filature silk in all deniers. Out of this, the weavers estimate between 50% to 55% is Mysore country charka silk mostly from Sidlaghatta side and the rest is cheap Chinese silk both white and yellow as well as Jangipur silk from Bengal. Unlike Gadag, Hubli in addition to natural silk consumes also artificial

silk

silk and the consumption of artificial silk is increasing day by day. The rate at which they purchase artificial silk is from Rs 1/12 a lb.- to Rs 2/8 per lb. The rate at which they purchase Mysore silk is from Rs 6/- to Rs 6/8 per seer of 26½ tolas. They go in for Chinese silks only when the rates are appreciably lower than Mysore silk.

It seems some years back they were getting white Chinese silk called "Zankin" diamond chop of superior quality and they are not getting that quality now and the loss in degumming is only 5 tolas per lb. and I leann that in Mysore silk the loss in degumming is 7½ tolas per lb.

They usually purchase Jangipur silk at favourable rates during Kartik, Chaitra, and Sravana months and the unit of weight in Bengal is for a seer of 80 tolas and the prices vary from Rs 22/- to Rs 25/- per seer. Out of the total quantity of silk consumed only about 15% is from Jangipur side. Just at present the consumption of artificial silk is about 25%. The priees of ilkal pattern saries ranges from Rs 16/- to Rs 70/- and Kanams from Re. 1/- to Rs 3/-. In addition to weaving some are solely engaged in dyeing silk required for local use and they use only German dyes.

Weavers do like our domestic basin silk and some of them are earnest and wanted quotations for domestic basin silk reeled out of Mungar crop of cocoons and the sizes for which they want quotations ~~is~~ are 16/20, 18/22, 28/30, and 40/45 per seer of 26½ tolas. They usually get their supply of silk from Sidlaghatta, and Chikkaballapur sides and they pay slightly higher rate for Sidlaghatta silk. Even in this place weavers are of opinion that the Chinese silk what they are getting now gives a very imperfect finish in dyeing and say that Mysore silk takes in all shades of dyes and gives a very good finish. Some of the popular names of kanams for which they use only Mysore silk:- (1) Varudu, (2) Kowli Hoo, (3) Godumbi, (4) Thoday, (5) Sarapaly, (6) Kiadegey, (7) Sudarsanam.

Weavers here are not in favour of getting twisted silk and they want only raw silk for the very reason that many poor people who are doing this work now would be thrown out of employment if twisted silk is purchased instead of raw silk. Messrs. H.G. Dipte and Sons,

Hubli

Hubli, an old firm expressed a desire to act as our Agents in Hubli for all high grade silks and promised to send their proposals in July or in August 1927. I learn from Messrs. Divte and Sons that Mr. F.L. Silva visited this place thrice and was not able to do any business as his rates were found to be very high.

Belgaum. - Belgaum town proper is not a silk consuming centre. Shahapur is a taluk head quarters of Sangli State about 3 miles from Belgaum is the chief centre both for manufacturing saries and kanams and an important distributing centre of twisted and dyed yarn.

Some of the weavers have specialised in weaving only kanams and one Mr. Mahadevappa Sankappa Thumbalag, Shahapur is a kanam specialist and the demand for kanams manufactured is so great that he is not in a position to fully meet the demand. Some special names are:- (1) Rudyapala, (2) Nakshi, (3) Jari, (4) Aigoornakshi, (8) Nakshi Nari.

The leading silk merchants of this place are only few and besides many Marwaries who in addition to money lending business also deal in raw silk on a small scale as a side business. Among the leading business of this place Messrs. Ganusa Nagasa Shalagar, Proprietor of Messrs. Narasingasa Shalagar Narayana Naik Co. (Silk Twisting Factory, Bangalore) is an influential man in these parts. As per his opinion the total number of pit looms are about 5,000 and the total consumption of silk in Shahapur is between 18 to 20 Lakhs. Out of this, at least 50 % of the silk consumed is from Mysore. The increase in the consumption of Mysore silk is from 1924 and the demand for Mysore silk is gradually increasing and the remaining quantity of silk consumed is from China and Jangipur in equal proportion, particularly this year the consumption of Mysore silk is less when compared to previous years owing to high prices of country charka silk. They do not use artificial silk in any of the fabrics. The rate at which Jangipur silk is purchased is between Rs 20/- to Rs 26/- per seer of 80 tolas and for inferior China silk used more for weft and slightly inferior Chinese silk for organzine and the rate at which this is purchased is Rs 7/- to Rs 9/- per lb. of 39 tolas. Superior Chinese silk both single and double twist is from Rs 10/- to Rs 11/- per lb. of 39 tolas. Prices for China Steam Filature silk are going down. The

rate at which Mysore silk is purchased just now is Rs 7/- to Rs 8/- per seer for Bangalore delivery. Usually prefer Kempanahalli, Anebele, Thimsandra, Muduvadi, and Sidlaghatta silks for the work.

In Shahapur they not only manufacture ilkal pattern ~~xxxx~~ saries but so many other patterns and also dhoties with silk borders are large ly manufactured here and they have a ready market for this in Northern Districts, Bombay and Berar.

Weavers in Belgaum are just now taking to Mysore Filature silk through Mr. Narasingasa Shalagar, who supply ready made yarn fit to be used for the loom. Mr. Shalagar is of opinion that for increased consumption of high grade Mysore silk, the prices should be favourable at least to that of best China Steam Filature Silk.

Sangli. - As already stated on my way to Poona I visited Sangli, 6 miles from Miraj where one Mr. Vishnupant has 24 power looms and he has just now commenced to use our Filature silk. He gets his twisted and dyed silks from Mr. Shalagar. The Proprietor of this mill has started his weaving work on a very modest scale for want of proper finance; his work suffered for some time. With more financial aid and a free site granted for the Mill by the Chief of Sangli, he built up his business and it is really creditable on the part of the Proprietor to see a substantial building of his own for the Mill. He manufactures only cotton saries for the use of the Maharashtra countries of beautiful designs with silk borders. He is very particular is using best materials and also expects a better price for the goods manufactured by him. He has always advance orders for his saries from Bombay side. He estimates that in future his requirements of Filature silk would be about 200 lbs. in sizes 28/30 and 40/45. The Proprietor himself is a professional man trained in Bombay Voctoria Technical Institute and he is an expert in designing. Some of the local weavers do copy his designs and he will be often changing his designs when some of his old designs become common in the market. Later on his ambition is to manufacture even silk saries. He is a strict disciplinarian and conducts work on up to date lines and his employees work un him with complete hormony. In the Mill my ~~xxxxxxxx~~ attention was attracted in bold Marathi characters and I wanted to know what it is

and

and I learn that it is his motto and was kind enough to translate that to me.

"Bad workman ~~xxxxxx~~ spoils not only his name, but also of the Institution in which he works, the name of his Town and that of his Country."

Poona. - Poona was once a flourishing centre for silk weaving, such as pitamber, Pytan saries and kanams with lace borders and flowers in the body, the prices of this varies from Rs 40/- to Rs 250/- and it is gradually dying away due to the introduction of artificial silk. The number of looms just now in Poona is about 1,500 and consume silk to the value of about Rs 2,00,000/- of inferior grades of Mysore and China twisted silks and they do not purchase raw silk.

Silk required for the manufacture of gold-thread, they get ready made dyed yarn from Surat at Rs 23/- for 55 tolas. The chief supplier of dyed silk to Poona Market is one Mr. Manikram Manaklal, Surat. All the gold-thread required for local consumption is all manufactured locally. There are about 8 gold-thread factories in Poona with 768 spindles. Some weavers do like both our filature and domestic basin silk provided it is supplied to them ready made yarn to be used directly in the loom. The saries and pithamber are manufactured in different colours, such as bright blue, and green and red. They find a large sale for these goods in Central Provinces, and all Maharatta countries, Hyderabad (Deccan) and Bombay Presidency. In addition to this another speciality of Poona is for the manufacture of pure silk with lace, used by brahmin ladies as outer garment called Shawlawas measuring 12' x 50" with naraly lace borders and star designs for the body and the prices of these ranges from Rs 70/- to Rs 200/-. The supply of twisted silk used in weaving is all from Belgaum (Shahapur). The weavers estimate that 90% of the silk consumed is all cheap Chinese silk and not even Jangipur silk. The weavers of this place are of opinion that the loss in degumming in Mysore silk is slightly more than white Chinese silks. The usual rate at which they purchase single twist, Shanghai Filature silk is at Rs 27/- per seer of 72 tolas. Weavers here who are anxious to try our silk want 60/70 deniers in single twist. The number of twist for Shanghai filature silk is 17

per inch. Usually they receive Shanghai Filature silks in bundles of 25 lbs. for each bundle. In Surat, silk required for gold-thread manufacture, they first twist and sort them in different grades and they give a deeper shade orange colour for coarser sizes and light shade for finer sizes and the local term is Peela of different shades in orange colour, Gahira means deep tint, and Pika, lighter tint.

These dyed skeins are received in hanks of 24" and the number of threads in each hank is 360 and the weight of these hanks vary from ½ tola to 1½ tolas and it depends on thickness of the thread, dyed, whether coarser or finer, the number of threads in a hank is only 360 and the total length in each skein is 240 yards. For a single hank they call "Ladia" and for double hank they call "Asara".

Gold coated to silver used for the gold-thread is called a "Mushi" and they are in different grades, such as 6, 8, and 10 Mushis. Mushi means the % of gold coated to 40 tolas of silver. The length of the silver wire drawn is 700 yards per tola and then it is flattened by a separate flattening machine, the increase in length by flattening is 300 yards per tola or 1,000 yards when it is flattened. Size of silk used here for the manufacture of gold-thread is 50/60 denier.

Some people in Poona purchase only twisted silk from Shahapur, dye and sell dyed yarn to local weavers. One of the merchants from whom I gathered information purchases silk to an extent of 25,000 Rs. worth of twisted silks of China and Jangipur inferior grades and he is also in favour of going in for Mysore silk, but he doubts that the % of loss in degumming in Mysore silk is more than Chinese white. He wants only country charka silk. Much of the silk dyed by him is consumed locally and the rest he supplies to Hyderabad weavers. In addition to this a pretty decent quantity of spun silk is also consumed here.

Bombay. - Bombay is not an important manufacturing centre like Surat and Benares, but it is the chief silk distributing centre to all parts of India of imported silks of all grades, i.e., raw and twisted silks in very large quantities from China, spun and raw silk from Japan, spun and finished silk goods both from Italy and England. In this place I was interested in collecting more of statistical information to form an idea as to the quantity of foreign silks that are being consumed in India. In Bombay there are very few importers of Chinese silk

of whom mention may be made of Messrs. Nagindas Foolchand Chinai, Sir Currimbhoy Ebrahim, and these are the important importers. Mr. Nagindas Foolchand Chinai was kind enough to furnish me all information regarding the imports and to give some suggestions in regard to the development of Mysore silk trade in India. Messrs. Nagindas Foolchand Chinai, in addition to their head office at Bombay have their branches at Shanghai in China, Ahamadabad, Malda in Jangipur (Bengal) and their import is between 50 to 60 lakhs of rupees worth of silk from China every year and all the other firms put together import between 70 to 80 lakhs of rupees worth of silk or the total quantity of raw, twisted and spun silk consumed is about a crore and 30 lakhs of rupees. In addition to this another 4½ crores worth of silk goods, not only silk, but includes artificial and finished silk goods and other goods with an admixture of other textiles, such as cotton, mercerized cotton, spun silk and artificial silk goods, etc. In their estimate and past experience, they think that India consumes about 10,000 bales of Chinese silk, whereas, China exports between 90,000 to 1,00,000 bales (Piculs) to America. One Chinese bale is equal to 133 lbs. and one Japan bale is 132⅓ lbs. or 100 kins and these are standard bales meant for American markets. The bales that are sent to India are not standard either in size or in weight, these bales vary from 107 to 150 lbs. and at times even 200 lbs. packing is also not perfect. Out of the total quantity of silk imported only 5% are of superior grade and the rest are of cheap inferior grades. This firm, their average import of silk from China for the last 10 years works out to Rs 55,00,000 per annum. All these are not only from Shanghai, but also from Canton, Hongkong, and Cochin China. It seems the silk reeled in Canton is very good in lustre and strength and they attribute this to the water of that place. There are so many other places like Shanton round about Shanghai which has its own peculiarities and fetches better prices and it is all due to climatic conditions and other facilities that they have there during the rearing seasons. From the latest report they had received from their Shanghai branch they are inclined to think that they expect a bumper crop of cocoons and it is anticipated that the price of silk would naturally go down. This firm has customers all over India. They supply all hi

grad

grade filature silks No. 1 quality required for Surat and Benarese for their gold-thread manufacture. Itisonly Surat and Benares are very particular in regard to quality of silk and they can afford to pay a better price for good silk. It seems the demand for high grade China Steam Filature Silk is increasing day by day and they can easily replace with our Filature and Domestic Basin silk provided our prices are as far as possible compare favourably to the high grade Chinese Steam Filature silk of various grades, i.e., the rates of our Filature silk should compare favourably to that of No. 1 Shanghai Steam Filature silk and domestic basin silk should be reasonably lower than that of our Filature silk. They are even prepared to send us quotations for their Chinese silks from time to time for enabling us to produce silk at workable rates. As regards our country charka silk their difficulty is that our silk is not re-reeled and graded up like Minchew and Kobung inferior grades of silk. If we are prepared tc do that with a proper organisation by insisting on the part of the reelers to bestow some attention towards size, knotting, etc. and have it re-reeled, they think they can create a large demand even at a better price than Chinese country re-reeled silks, which is wanting in lustre. They would like to have our country charka silk graded up to Districtwar with suitable chops in 4 or 5 grades to distinguish the one from the other. This firm in addition to Chinese silks, also deal in Bengal improved charka silks, but in their opinion they think the production of silk in Bengal is gradually diminishing each year, the reason for this is that the people now are more interested in jute cultivation. They even go to the extent of thinking that in the near future the silk industry in Bengal may even disappear and jute cultivation will take the place of mulberry cultivation there. I learn from them that America has consumed in 1914, 1,85,526 bales, in 1924, 2,61,182 bales, and in 1925, 3,25,747 bales from Yokohama, whereas Canton has exported to America 37,539 bales in 1915 and in 1924, 61,405 bales. Total number of bales imported to India in 1915:- (a) white silk - 2,759 bales, and in 1924 (b) yellow silk - 9,705 bales, white silk - 2,146 bales, yellow silk - 8,232 bales,

GEN. & REV. SECRETARIAT DEVELOPMENT 5 - MAR 1928

They also suggest that our Government should prevent as far as possible exportation of cocoons and have proper control over cocoon market with the introduction of standard weights for cocoons and at the same time to find out ways and means to improve the quality and to create better market facilities for the people who are engaged in it. Before trying to compete with Chinese silk in India they think it is necessary to increase our cocoon production and popularize the use of our domestic basin in all sericultural centres and with the Departmental control and with the aid of the proposed silk association it is easy for us to organise and grade up our silk according to the needs of India's demand.

That it is very essential to have a"silk testing house" or a "Conditioning House" for Mysore so that the silks of all grades reeled should undergo the necessary tests and point out to reelers the defects in our silk and suggestions to improve the quality and to be in a position to supply the quality required by the customers. That grading of country charka silk is also very necessary in order to classify our country charka silk along with the most popular Chinese country reeled silks, such as Kobung and Minchew silks that is largely consumed in India. They also suggest to subscribe for an English daily edited in China, called Osaka, wherein we can get all information regarding raw silk and markets, etc. I discussed with them the various factors that governs the fluctuations of the silk market and in their ripe experience of about 57 years in silk trade they are of opinion that the various factors that governs the fluctuations of the silk market are due to (1) variations in exchange rate in Europe and other Asiatic Countries, (2) demand for silk in America, i.e., when the demand for high grade silk is more in America, the Chinese filature owners will naturally divert all their attention towards reeling high grade silks for American market with their first grade cocoons and as such they cannot afford to pay much attention to India's requirements in reeling their inferior grade of cocoons, then they demand the price of their own, the result is the rates are always not steady and the fluctuation in rates are always very frequent. If the demand is slack they then think of

DEVELOPMENT - MAR 1973

India and work with full vigour in reeling their inferior grades of cocoons and push on their goods at such a low rate, it is then very difficult even for Indian silks to compete with China silk.

Surat. - From the inquiry I learn that the place has a population of 1,40,000. Out of this very nearly 50% of them is in one way or the other connected either in silk, twisting, weaving, gold-thread manufacturing, or in silk dyeing, etc. The lace required for gold-thread is also manufactured locally, i.e., from melting of silver to drawing to the finest wire possible up to 2,000 yards for a tola of silver. This place can boast of 5,000 Halteys Power Looms worked both by Electric power and oil engine. There are about 4,000 improved pit looms of indegenous type. This place consumes between 50 to 60 lakhs of rupees worth of natural silk and in addition another 25 to 30 lakhs of rupees worth of artificial silk per annum though in money value the consumption of artificial silk is 50% and in quantity it is 3 times more than the consumption of natural silk. Taking at an average rate for natural silk at Rs 12/- per lb. and at Rs 2/- for artificial silk, the total quantity of natural silk consumed will be about 5,00,000 of lbs. whereas the consumption of artificial silk works out to about 15,00,000 lbs. By this we can judge as how the artificial silk is playing havoc in India. The use of artificial silk in Surat is on the increase only for the last 4 or 5 yeats. Before the introduction of artificial silk their annual consumption of natural silk is between 80 to 90 lakhs. Even now the manufacturers do know that the use of artificial silk will not continue long and for the time being it pays them. Usually the manufacturers who are using artificial silk, majority of them who cannot afford enough capital for their work do go in for artificial silk. Important manufacturers who have enough capital, stick on to natural silk even now and they will never cate to touch artificial silk even if it is supplied to them free and they have an aversion to use it in their looms. In addition to silk and artificial silk goods manufactured in Surat they also manufacture goods with an admixture of spun, mercerised cotton, etc.

Goods manufactured in Surat find a sale not only in India but has a large demand in South ~~America~~ Africa, (goods manufactured in bright colours

colours) Burma, Ceylon, Such as Arabia, Siam, Strait Settlements, Java, Sarbia, Federated Malay States and ~~Cook~~ even Paris and Parsians are particularly fond of garamsooth and daria-mouse silk cloths used both by ladies and gents for outer garments. Out of the above said places it seems that Burma alone consumes about 50 lakhs of rupees worth of finished goods per annum from Surat. Singapur and Malay States consumes between 10 to 15 lakhs worth. The leading manufacturers in Surat have their branches in all the above said places.

These activities are not confined to one particular area or locality in Surat but it is distributed all over Surat, but it is intensly carried on in narrow and dirty lanes of Begampura, Haripura, Rampura, Sangrampura, and Sabalpura. Major quantity of silk consumed in Surat is of high grade steam filature silk and nearly 80% to 90% of the high grade silk consumed there is all from China steam filature silk and of late they have also taken to the use of Kashmir silk and the consumption of Kashmir silk is gradually increasing. The prevailing rates for the last 3 years are as follows:

(a) Chinese high grade silks -

Price of Canton silk in 1925 - Rs 38/- per seer of 72½ tolas and this year at Rs 20/-.

(b) Price of artificial silk in 1925 was Rs 5/8 and now Rs 2/- per lb. of 39 tolas. In Surat they use all kinds of artificial silk. They class England "A. Silk as No. 1 quality 150 X. Germany - No. 2, and Italy - No. 3" quality

Just at the time of my visit to this place the manufacturers were complaining that their business is very dull and they have a large stock on hand unsold. The leading manufacturers of this place expressed that they would even give up using Chinese silk and take to Mysore silk.

If our rates are also favourable to them and as regards quality of our filature and domestic basin silk they have nothing to say and think it is as good as Chinese high grade silks.

Working capacity of different looms:-

(1) Power looms, automatic fly shuttle. An expert weaver can weave 3 saries per day, saries measuring 7 yards by 45". Mostly artificial silk is used in weaving saries in power looms. Only very few are Italian looms and the rest are Hatesly looms manufactured by

Messrs.

Messrs. Henry Livesay and Co., London.

(2) Improved looms - An expert weaver can weave from 1½ to 2 saries of the above said measurements in a day.

(3) In pit looms even for expert weaver it takes 4 days to weave one sary.

Ahamadabad. - When compared to other weaving centres, Ahamadabad is an important centre for cotton mills. There are 75 large cotton mills in Ahamadabad. Silk weaving is being carried on on a very small scale and this place is particularly noted for the manufacture of Gazi, saries of Maheswar pattern and peethamber, etc. Samples of our silk were shown to important manufacturers and in their opinion they compare out silk to Canton steam filature silk and they think our silk can be easily marketted there, if prices are similar to that of Chinese silks. The weavers say that our silk can be easily used in weft and they think that they cannot use our silk in warp and in their experience it seems white Chinese Kaihing serves their purpose in warp very well and in addition to this they also use Shanghai white and yellow filature silks specially for warp. They purchase both raw and twisted silks, but more of raw silk than twisted silk. The total number of looms in Ahamadabad is only 400 and their annual consumption is about 5,000 lbs. In addition they also manufacture gold-thread for embroidery work, for this they use only coarser spun silk and it is mostly used for inferior kinds of kinkabs.

The prices at which they were then purchasing Canton steam filature silk white No. 1 at Rs 11/8 per lb of 39 tolas, Shanghai filature silk, white No. 1 at Rs 13/- per lb. and yellow No. 1 at Rs 12/4 per lb. They do not purchase any silk either from Bengal or Kashmir, they think that these silks are costlier than Chinese silks. In fact they are not very particular about the quality and all that they want is cheap filature silk and they will stick on to any silk if the prices suit them.

Mr. R.B. Chinai, Partener of Messrs. Nagindas Foolchand Chinai, Ahamadabad gave me to understand that the busy season in Bombay for raw silk is from July to August and it is only then the crops of in China are in abundance and the rates also very favourable

and it is only then even your silk will find a large sale provided the rates are favourable. And in his opinion he thinks that 16/20, 24/26, 40/45, and 90/110 are some of the popular sizes that can find a ready sale. In finer sizes such as 16/20, and 24/26 only we should have one grade as No. 1 and in coarser sizes, i.e., in 40/45 and 90/110 he thinks it better to have in 3 grades, i.e., No. 1,2, and 3. The sizes mentioned above can find ready sales all over India and all other odd sizes should only be reeled against orders.

In Bengal their big cocoon crops are three in number, i.e., November, March, and August. Out of which their November crop is supposed to be the biggest and best crop.

The present condition of silk weaving industry in Ahamadabad. - Some 20 years back the weaving industry was in a flourishing condition and there were thousands of looms for weaving silk, the cotton mills were not many then as now.

Out of the population of 5 lakhs in Ahamadabad very nearly one lakh and a half find occupation in these cotton mills and the wages they get is Re. 1/- to Rs 3/- per day.

Another reason for the decline of silk weaving in Ahamadabad is that unlike Dakshani and certain places in Bombay Presidency who are always fond of weaving local made silk saries and Gujarati ladies are always fond of wearing thin mill made cotton saries light attractive shades and designs. Hence, silk weaving is not thriving well and these saries they were once importing from Manchester and now the local mills manufacture these saries.

As already stated the local silk weavers are now engaged more of weaving gaji. Gaji is a plain pattern silk cloth for which they use raw silk as warp and for weft Japanese spun silk the cloth after weaving is bleached and dyed in various shades. The gaji is used more by Gujarati ladies for their under-wear and silk jackets they use very fine texture of cotton or muslin and not silk.

THE PUNJAB. 3/4

Lahore. - Lahore in Punjab is neither a silk manufacturing centre nor distributing centre and I was obliged to halt in this place more to the Director of Industries to whom I had a letter of introduction

from the Director of Industries and Commerce, Mysore. I called at the Director's Office on 21-6-1927 and learnt from the Personal Assistant to the Director of Industries that Dr. Rawley, the Director was away at Simla for summer season. He was kind enough to give letters of introduction to his Weaving Superintendent at Amritsar and as that place is noted for silk embroidery work and he was also very much interested in knowing certain details regarding our Filature work and the special features of our domestic basin, etc. and gave me an idea that the annual cocoon production in Punjab as per figures furnished by the Agricultural Department is about 300 Bengal Maunds of univoltine cocoons.

Amritsar. - I had a very interesting time in this place. The weaving Inspector of the Government Weaving Factory to whom I had a letter from the Personal Assistant to the Director was kind enough to take me to almost all the important silk merchants and manufacturers in Amritsar. The manufacturers here use more of Kashmir silk than Bengal raw silks and the consumption of Chinese silks is very little and in fact they are not very particular about quality and all that they want is cheap filature silk. Their requirements are 60/65, 70/75, and 90/110 deniers. They also purchase large quantity of unbleached single twist silk and their requirements in spun silk is 20/60 number. Some of the manufacturers who are now using spun silk for their weavings are anxious to try some new pattern in coating with our silk in coarser sizes of 70/75 and 90/110 if we show them concession rates in the beginning, i.e., the rates should compare favourably to Kashmir silk or are slightly higher than Kashmir silk. Any rates higher than that they say will not pay them. Some of them are very keen in using our silk instead of spun silk.

The following are the extracts from a lengthy report submitted by the Weaving Inspector to the Director of Industries in Punjab regarding the present condition of weaving industry:-

(1) "Though the total number of people engaged in weaving in Punjab is 8,96,026, the condition of the weavers are miserable on account of their conservatism and ignorance of improved methods. The looms used by them are very

primitive.

(2)"These weavers are entirely under the thumb of capitalists to whom they are bound to sell their finished products.

(3)" The capitalists are so very selfish and they particular abou their own profits, do nothing to help them to stand on their own legs.

(4)"The use of fly shuttle looms is common and modern methods are more extensively followed only in Amritsar, Ludhiana and Garat, etc.

(5)"Students trained in the Central Weaving Institute have set up their own improved looms and they are now in a position to turn out beautiful designs of silk fabrics in their looms and some of the students trained are also employed in Weavir Mills and earn from Rs 40/- to Rs 50/- a month.

(6)"The Industries Department is expected to do a lot in the development of weaving industry and to ameliorate the condition of weavers when they start work in the proposed power weaving factory with 100 looms in Shahdara.

(7)"Some of the professional weavers are showing an inclination to take to power looms if they are given the required training with suitable stipends during the period under training.

(8)"The success of the weaving industry in Ludhiana is due to their efficient organisation in all the branches of weaving and each branch has its own organisation and they are controlled by different Associations, such as (a) Durn Weavers Association, (b) Durrai Weavers Association, (c) Hoseiry Association, (d) Factory Association and the head of these Associations is the local Industrial Board composed of various representations from the various Sub-Associations. The entire credit of the above said organisation is due to Mr. Wirbhan, M.A., the then Industrial Surveyor, Ludhiana."

(a) Total Number of looms worked in Punjab are as detailed below:

(a)	Primitive pit looms	- 1,72,894.
(b)	Fly shuttle	- 2,948.
(c)	Salvation Army fly shuttle looms	- 9.
(d)	Halerstay looms	- 2.
(e)	Jacquard looms.	- 6.
(f)	Dobby machine	- 2.
(g)	Carpet looms	- 526.

SECRETARIAT 3 - MAR 1929 DEVELOPMENT

weavers. The weavers in Amritsar want their raw silk that could be easily separated from a skein to atleast 7 in number, that is they want us to tie the skein at least once an hour. Just now out of the total consumption of silk nearly 50% is artificial silk.

Ludhiana. - The need for visiting this place I have already stated in my introductory para. This place is specially noted for hoseiry and there are about 75 hoseiry factories in Ludhiana and majority of them are now using artificial silk, mercerised twisted and spun silk and very few factories are interested in using only natural silk. There are about 1,000 knitting machines in this place, in addition to this, silk weaving is also being carried on on a moderate scale. Some of the weaving factory proprietors with whom I had to discuss are now thinking and using natural silk of coarser denier in place of Japanese spun silk.

The important manufactures of this place are shirting and coating cloths. They get their supply of spun silks from Bombay, mostly Italian and Japanese spun silks. Artificial silk is also largely used in addition to spun silk. The total number of looms in Ludhiana including pit looms is about 3,000 looms. I was given to understand by one Mr. Amarnath, the Managing Director of Nationals, Ltd., Ludhiana that the use of artificial silk is gradually loosing ground and it is not in the least competing with natural silk, but it really competes with cotton. It seems the Imperial Government are even thinking of removing the import duty of 15% levied on artificial silk.

The prices of Italian and Japanese spun silks consumed in this place they purchase at Rs 65/- for 11 lbs.

As usual even in this place the weavers complain that our prices are very high, when compared to Kashmir silk and they expect from us every now and then our quotations for raw silk of coarser sizes.

Meerut. - This place was once an important silk weaving centre and now they use only cheap artificial silk and the total number of looms in Meerut is about 300 and they wear only saries in Gandy colours measuring 5 yards x 45".

Delhi. - When compared to other centres Delhi is not a very important centre for silk weaving and the entire silk trade is purely under the

The primitive pit looms are very common and they are mostly in Hoshiapur, Jullunder, and Sialkote. It is only in Amritsar, Ludhiana, and Jattam, where the use of fly shuttle looms are common. Sir Louis Dane Weaving Institute in Ludhiana established in the year 1908 and managed by the Salvation Army in spite of their attempts to introduce their patent fly shuttle looms they were not successful.

Multan, Kakarbagh, Kasur, Sialkote and Gagramalu are important centres for the manufacture of a kind of fibre called safi and the safi are of two kinds, i.e., (a) with black silk warp and 40s cotton in the weft, (b) with black cotton warp 30s and red cotton weft of 40s and the kind of safi is called Mashru. In Multan alone about 500 primitive pit looms are engaged in manufacturing this cloth. The sahukars or capitalists export this kind of cloth on a large scale to Sind, -- Beluchistan, North-west Frontier Provinces as far as Kabul. It is sold there from 6 annas to 14 annas per yard according to quality.

Kulubagh in Manwala District produces varieties of Susi cloth, but it is differently named as Gubbadan, salari, punjkami, chekani and nankami which is exported to Bannu, Kohat, Tonk, and other -- Frontier Provinces to the value of Rs 1½ to 2 lakhs, but the trade there seems however is gradually declining due to growing attraction among all classes of people for cheaper and better finished striped pattern mill made cloth.

Tehband lungies and lachas - these are manufactured both in cotton, mercerised and as well as in raw silk of plain striped and check designs. This is the only cloth that has a large demand even now in spite of cheap foreign imports.

The total consumption of silk in Punjab for various manufactures:-

(1) Natural silk	-	Rs 28,72,100/-.
(2) Gola Daryai	-	Rs 13,94,900/-.
(3) Artificial silk	-	Rs 14,94,900/-.
(4) Fancy silk coating and shirting.	-	Rs 45,587/-.
(5) Saries & dupties	-	Rs 40,000/-.
(6) Kerchiefs.	-	Rs 3,72,500/-.
(7) Gulbadari	-	Rs 11,70,000/-.
(8) Silk lungies	-	Rs 1,00,000/-.
(9) Lungi and patta turban.	-	Rs 3,30,000/-.

Silk weaving in Punjab is confined to very few places and is of very old standing and it is entirely under the hands of expert

weavers

CENTRE 3 - MAR 19 DEVELOPM

hands of very few merchants. The nature of demand in this place is mostly for coarser sizes and the demand for finer sizes is very little. Among the merchants, Messrs. Nidarmal, Tippumal and Abdulla Fidabulla of Chelki Bazar, Delhi, are the leading men interested in raw silk. Both these merchants put together consume about a lakh of rupees worth of silk and other merchants may consume about a lakh of rupees worth of natural silk and the total consumption of artificial silk in Delhi is about 150 cases, each case containing 200 lbs. and they use only Italian artificial silk. The demand in this place is more for coarser sizes of country charka silk and the size they need is from 70/75 to 90/110 deniers. Among the samples shown to merchants here like our Sidlaghatta and Closepet country charka silks and they use this more for embroidery work. Just at present the above said merchants get their supply from Messrs. S.S. Ramaswamisa and Kothandaramasa, Silk Merchants of Chickpet, Bangalore City.

Agra. - Mr. Devi das Chunnilal is the only silk merchant in Agra and this merchant is interested only in coarser kinds of uniform sizes of pure white silk for lametta work and the size he required is 55/60 denier. This merchant is of opinion that our filature and domestic basin silk is too costly for his purpose and on the other hand he prefers using our country cha... silk re-reeled paying some attention towards uniformity and free from loose ends. I convinced him that the cost of re-reeling our country charka silk reeled in very primitive method will be almost equal to our domestic basin silk. For the present they purchase "King Lung" Steam Filature silk reeled out of Douppian cocoons at Rs 8/- per lb. and Kakdia white China like our country charka silk, but more uniform in size at Rs 10/- per lb. of 40 tolas. In Agra there are about 25 factories for Lametta lace manufacture. Artificial silk is not in use in this place. The annual consumption of silk in Agra is between Rs 60,000/- to Rs 70,000/-.

This merchant wanted to try a sample ~~with~~ 1 or 2 lbs. of our country re-reeled silks and another merchant who has just now started business in silk is Mr. Attab Hussain, Naick Mundi.

Allahabad. - My stay in Allahabad was only for few hours during which time I called on at the Secretariat and there I learnt that the Director of Industries was at Nainital. The Manager of the Office gave me to

understand that Allahabad is not a silk consuming centre and from other ~~xxxxxx~~ enquiries also I learnt the same and so I left Allahabad the same evening to Benares.

Benares. - Benares is not only famous as a place of piligrimage for all Hindus and at the same time it is also noted for various kinds of industries and among them special mention may be made to brass works, gold-thread manufacture, High grade silk and artificial silk weaving. Though the merchants dealing in raw silk are so many, yet the important merchants who have wholesale dealings are very few and the important merchants among them are Messrs. Munnalal Madanlal, Brijpaldas Mukundalal, etc., etc., Out of the above Mr. Munnalal Madanlal, I should say is a leading man in raw silk trade and he is the sole agent in Benares for Kashmir silk and he sells between 40 to 50 thousand lbs. of Kashmir silk and they consume all sizes of silk from 13/15 to 90/110 deniers.

In Benares, they purchase also twisted silk up to 16/20 deniers and they prefer to purchase only raw silk above that deniers.

Annual consumption of only raw silk in Benares is between 50 to 60 lakhs worth of rupees in addition to this they also use in large quantities of spun silks imported from Italy, Japan, France, and Switzerland to the extent of 50 lakhs. All the raw silk consumed now are Chinese silk 25%, Kashmir 25%, Bengal 35% and Japanese ~~25%~~ 15%.

Mr. Munnalal showed me the original invoice of Bangalore silk filature and the rate at which Mr. Silva supplied silk to this gentleman in March 1927 is Rs 13-2-0 per lb. for 13/15, Rs 12/12 for 16/20, and Rs 11/- for 40/45 and he has also supplied twisted silk, size 13/15 at Rs 19/8 per lb. Mr. Munnalal Madanlal is also interested in artificial silk and sells between 70 to 75 thousand lbs. per annum.

~~xxxxxx~~ Benares is specially noted for the manufacture of gold-thread, embroidery, brocades, peethambers/ pata and high class saries.

Total number of looms in Benares is about 30,000 and they use organsine Japanese white silk (Kuthu) and it seems it is strong, Kashmir and Bengal silk for weft. The weaving industry here is so well organised that no weaver has any direct dealings outside Benares and all their requirements, they purchase from local silk merchants. The usual rate at which they purchase Bengal silk at Rs 30/- per seer of

86⅔ tolas and our rates for filature silk when compared to Bengal silk works out to Rs 30/- per 78 tolas and the Japanese white twisted silk at Rs 54/- per seer of 86⅔ tolas. The weavers here use artificial silk in very small quantities even for costly silk saries. The weavers of this place are of opinion that they can put our silk to profitable use in their weaving, if prices are favourable to them. I learn that nearly 50,000 people are directly or indirectly engaged in silk weaving gold-thread manufacture, etc., etc., and the majority of the people engaged in weaving are Mahomedans. In Benares they have their own standard weights and measures, i.e., our 6 tolas or 6 rupees weight is equal to 5 Benares Tolas and 6 Benares yards is equal to 7 English yards.

Rates current for Kashmir during the first week of July 1927. - 16/20 - Rs 13/4, 18/22 - Rs 13/2, 20/24 - Rs 13/-, 24/28 - Rs 12/14, 28/32 - Rs 12/12, 30/35 - Rs 12/10, 40/45 - Rs 12/8, 70/80 - Rs 12/6, and 90/110 - Rs 12/4. The demand for raw silk in Benares is mostly for finer sizes.

Messrs. Rasiklal Sircar and Bros. of Benares assures that they will try their best to popularise our silk in Benares. The weavers in Benares have some superstition in using any other silk in warp except Japanese silk, but in their opinion and experience, they think that the weavers can very well use our silk in warp and they have promised to induce their clients to use Mysore silk.

Total population of Benares is about 3¼ lakhs and nearly 40% of the population are Mahomedans. Till 1920 Benares used to consume between 70 to 75 lakhs of rupees worth of gold-thread imported from France; but for the last 7 years all the gold-thread required is being manufactured locally and the use of foreign ~~silk~~ gold-thread is not even 1% of the total consumption now. The manufacture of gold-thread is being carried on both by Hindus and Mahomedans and the manufacture of high grade saries is mostly by Mahomedans. Messrs. K.S. Muthial and Co. of Madras have their branch here and they weave mostly Madras and Bengal pattern saries and they have special weavers and own 50 looms for this kind of work and they also promised that they would try their best to popularise our silk.

Patna. - Patna town itself is not a silk consuming centre and in

Bihar and Orissa, Baghalpur is the only silk consuming centre. This place consumes mostly Italian spun silk. Artificial silk is not consumed inlarge quantities. In addition to consumption of spun silk Tassar silk is also consumed in large quantities in Baghalpur. It is said that Baghalpur has 7,000 to 8,000 looms. The Chief manufacture in this place are scarfs, Chaddars, shirtings, coatings, and peta, etc. Both Mahomedans and Hindus are engaged in weaving.

In Patna it is only the Government Cottage Industries Institute is interested in knitting work and later on they intend introducing also silk weaving. The Superintendent, Cottage Industries Institute showed me a sample skein of silk, size 40/45, received from the Bangalore Silk Filature. The Superintendent kindly promised to place orders for all his requirements in future with us and for twisted silk to Messrs. Narasingasa Shalagar Narayan Naik Co. of Bangalore.

I had taken from here the sample stockings sent by them showing defects in our reeling and discussed on the defects pointed out by them and the Superintendent was convinced that these defects are due to their entrusting the work of bleaching raw silk to untrained people and suggested to try bleaching the knitted goods instead of raw silk by people who have enough experience in bleaching and also requested the Superintendent to send an unbleached stocking to Messrs Narasingasa Shalagar Co. for bleaching and one for trial at the Insti-tute to see the results of bleaching.

Calcutta. - In Calcutta during a day's stay there were able to meet the Manager of the Scindia Steam Navigation Co., Ltd., to whom I had taken a letter of introduction from Seth Narotham of Bombay and he in return kindly introduced me to Mr. A.Y. Werlom, Director of Industries, Bengal. The Director indirectly expressed a desire that he is not in favour of introducing any other silk in Bengal to compete with their own silk (Bengal) and I also met two merchants dealing in raw silk and they are all interested in cheap and coarse kind of silk and they want coarse silks within Rs 6/- or 7/- per lb. There is no demand for high grade silks in Calcutta.

Peddapur. - On our way back from Clacutta to Rajahmundry, Messrs. Nagindas Foolchand Chinai of Bombay wanted me to meet one Mr. Muppanna

Somarajulu

Somarajulu of Peddapur as this man is one of the important manufacturers and consume large quantity of raw and twisted silk. We met this gentleman on the 8th July 1927. He manufactures silk saries silk upper cloth for gents use and narmadys in his factory. He uses mostly Canton silk - size 20/24 and the rate at which he purchases this silk then at Rs 21/4 per seer of 72 tolas and Shanghai silk at Rs 22/- per seer of 72 tolas. I learnt that recently this gentleman has taken a loan of Rs 50,000/- from the Industries and Commerce Department, Madras, to further develop his business. He consumes about Rs 30,000/- worth of silk each month. He owns about 310 -- improved pit looms, weaves only pure silk, does not even use cotton in his weavings. He likes our sample and as usual even he complains of our high rates. Lately he has also started twisting work in his factory and he has admitted that the twisting when compared to Messrs. Narasingasa Shalagar Co's, the twisting done in his factory is rather deffective and expressed that he would in future get ready made warps from Messrs. Narasingasa Shalagar and Co. if prices are favourable to him.

Rajahmundry. - Rajahmundry was once a flourishing silk weaving centre with 400 looms and it is gradually dying away and now the total number of looms in Rajahmundry is not even 20. The few loom owners whom I met were also not very much interested and their special manufacture is only narmadys for which they get inferior grades of Chinese silk.

Madras. - I met Mr. Amalsad, Textile Expert to the Government of Madras with the letter of introduction kindly given to me by the Director of Industries and Commerce in Mysore. He explained to me his views and schemes for the development of sericulture in Madras Presidency and was kind enough to instruct his weaving assistant to take me round the Institute and also to introduce me to some of the silk merchants in Madras.

At the weaving Institute besides other things, I saw few Italian domestic basins fitted up there for purposes of demonstration and side by side, I also saw Mr. Amalsad's improved country charka. The weaving assistant introduced me to some of the silk merchants in Chintadripet

and from the information gathered the demand is not much and their requirements are only cheap and inferior grades of silk and they are not very particular in using either Chinese, Kashmir, Bengal, and Mysore silk and they will go in for any silk that is cheaper to them, With the result their consumption is mostly Chinese and Mysore country charka silks.

The next day I met the Director of Industries and Commerce in his office. The Director during his recent visit to Mysore it seems saw our Domestic Basins and he is thinking to place an order with us for a unit of 5 basins and for other things he kindly referred me to the Textile Expert. On the 12th morning I left Madras for Perambur to meet the Managing Director of India Gold-thread Mills, Ltd., who is one of our old customers to see and book fresh orders from them. Owing to some dispute among the Managing Directors their factory was just then closed work and the case is before the Court and the Managing Director Mr. Narayana Bhagavathar was kind enough to promise to place orders with us as usual as soon as they restart work. The Director also gave me an idea as to their future requirements in raw silk.

(a) In denier 11/13 of 3 threads are taken will it give a round shape in twisting and for this, I suggested to the Director that I will be in a position to get samll sample skein of silk twisted in Messrs. Narasingasa Shalagar ~~Narya~~ Narayan Naik Co of Bangalore as soon as they restart work. And even I suggested that they can in future twist all their silk with them, as twisting machinery in their factory is more modern and gives very satisfactory results in twisting when compared to other factories in Bangalore.

(2) For twisting 7 threads of 5 deniers each thread to get a twisted silk of 30/35 deniers.

Bangalore. - I left Madras on 13th July by Express. I met both the Director of Industries and Commerce in Mysore and the Secretary to the Government of Mysore, Development Departments and explained to them in brief the results of my investigations and as per Director's instructions I had an interview with the 2nd Member of Council and the Dewan Sahib to give them an idea of the future Mysore silk trade in Northern India and left Bangalore on the 15th night and reported

for

for duty on 16th July 1927. Proposals indicating the effective introduction of Mysore silk in Northern India:-

By the information gathered in Northern India, that the Mysore silk reeled as per crude methods is just at present being consumed mostly in Southern India and very few places in Bombay Presidency such as Gadag, Hubli, Belgaum, and Poona. Beyond Poona and in fact whole of Northern India no manufacturer or silk merchant is in need of raw silk reeled in country charkas. The reason for this is that the important silk consuming centres in Northern India where the weaving industry is so well organised that they cannot put to any profitable use in their power and improved looms. The silk reeled in country charkas with all possible defects, such as, ununiformity, loose ends, floss, want of elasticity and tenacity is not to their advantage.

On the other hand there is vast scope to popularise our silk in these parts if the quality of our silk is improved. The demand there is not only for finer sizes but also for coarser sizes of uniform thickness without loose ends, etc. The manufacturers there care more for quality and can also afford to pay decidedly a better price than what our people realise in South India and other markets.

In South India, Gadag, Hubli, and Belgaum in Bombay Presidency where the weaving industry is as primitive as our reeling industry and they do want only cheap silk of inferior quality to suit their primitive pit looms, and Mysore is now producing silk for that market and meet a major portion of their demand.

Out of the total quantity of silk imported from China only about 5% are of high grade silks of finer sizes reeled in steam filatures and the rest are all of coarser sizes of uniform quality and now the demand even for finer sizes is gradually increasing in India. Even these finer sizes that are imported from China are not reeled out of their 1st grade cocoons. 90% of the silk reeled out of their 1st grade cocoons is exported to America.

In order to create better market for our silk we have not only to improve the quality of our silk and at the same time sell our silk at competitive prices to that of China and other Indian silks of improved quality.

Chinese silk is very popular in India and their business organisation is perfect and they can afford to sell silk in India much cheaper than any silk produced in India. They not only grade up their cocoons with an organised cocoon market, fix rates according to quality of cocoons. The silk imported to India is reeled all out of their 2nd and 3rd grade cocoons. The silk reeled out of their 1st grade cocoons they realise very high prices in America. So they are in a better position to under sell us in India-

Kashmir. - Even Kashmir can afford to compete with Chinese silk, as the silk industry there is a state monopoly.- The Durbar gets all the cocoons produced there to the reeling factory (filature) at a fixed price which is very very low when compared to Mysore cocoons and in that way they are also in a better position to compete with Chinese silk.

Bengal. - In Bengal unlike Mysore the reeling industry is being carried on as a factory concerns by capitalists with all possible improvements in their reeling basins, such as, ~~introducing~~ introduction of buttons for maintaining uniform size, (and steam arrangements for cooking, reeling, etc. and as such they can also supply the quality required in Northern India. The filature owners there fix prices of cocoons on the basis of the ruling prices of China and Kashmir silks. So the filature owners keep the cocoon market under control. They can also afford to compete with China and Kashmir silks.

For Mysore to compete with silks that are already familiar in Northern India markets, our present difficulties are (a) Primitive system of reeling, thereby we are not in a position to supply the quality required to Northern India markets, (b) unhealthy competition and without any control over cocoon market, (c) the fluctuation in cocoon market is so varying and the prices fixed are not at all based on the ruling prices of silk markets where they are now selling their raws, (d) the so called scale used for weighing cocoons is also an obstacle in the way of keeping the cocoon market under control and by the use of that scale it is possible to manupulate any weight and the purchasers usually get more cocoons and so they can afford to raise the cocoon market and as such we are not just now in a position to successfully compete with an organised foreign competitor like

China

China, Kashmir, and Bengal among Indian silks.

When China, thousands of miles away from India can successfully compete with us, it should be our aim and with that hope people interested in the development of silk trade should without any further loss of time should take to improved methods of reeling and with the help of the Village Panchayats and with the aid of the Silk Associations, I think we can do a lot in the development of silk trade in India by rectifying some of the evil practices that are prevailing now in our cocoon market. The introduction of the domestic basins in large numbers in all reeling centres is very necessary for improving the quality of our silk, thereby to meet the requirements of Northern India. Fixing up prices of cocoons from time to time will also be easy and it will automatically adjust on the basis of the prevailing market for Chinese, Kashmir, and Bengal silks.

The defects that are prevelent now in our cocoon and silk trade what I think is more for want of proper organisation and cooperation between people who are engaged in different branches of sericulture in Mysore, systematic organisation and cooperation is only possible by a constituted bodies like Central Silk Association and Village Panchayats and with the aid of Sericultural Department for all technical advise, I think we can easily eradicate some of the evil practices and organise better methods that is being adopted in all other advanced sericultural countries. When we accomplish this, I think we will also be in an advantageous position to develop our silk trade in India. The following points on which I think we have to devote our special attention:-

(1) Increasing the area under mulberry and encouragement to start mulberry topes.

(2) In-creasing the output of cocoons in the State to at least double the quantity than what it is now within the course of next 10 years.

(3) Grading and fixing up prices of cocoons according to the quality of cocoons and introduction of suitable weights for weighing cocoons in place of crude ones now existing.

(4) Increasing the number of domestic basins in reeling centres i

place of country charkas by offering special concessions to reel owners either by hire purchase system or any other system that is more convenient for reeler to repay the cost of basins.

(3) ✓ (5) Grading the quality of Mysore silk according to the needs of the manufacturers in India.

(4) ✓(6) Establishing a conditioning house to conduct tests for the silk that goes out of Mysore and should bear a conditioning house certificate regarding the quality, etc.

(5) ✓(7) The Central Silk Association in addition to their branch Associations should also form separate Associations for mulberry growers, silk-worm rearers, seed rearers, reelers and silk merchants to safe guard their interests.

(6) ✓(8) Appointment of reliable agents to represent Mysore silk in all silk consuming centres.

(7) ✓(9) To get weekly quotations from all parts of India from leading silk merchants the ruling prices of Chinese, Kashmir, and Bengal silks to enable us to fix up prices of our cocoons and to produce silk at workable rates.

Before concluding my report I wish to express my sincere thanks to all the Directors of Industries and Commerce of different provinces concerned and to the Textile Assistant to the Government of Madras, the Superintendent of Sericulture, Hyderabad(Deccan), who were pleased to render all help in my investigation and my thanks are also due to all the silk merchants in spite of their busy time, were kind enough to give very valuable information in regard to silk trade in those parts. Among the merchants and friends, special mention may be made of Rao Bahadur Padma Rao Mudaliar, Secretary, Chamber of Commerce, Secunderabad, Seth Narotham Moorarji (Bombay), Messrs. Nagindas Foolchand Chinai (Bombay), Mr. C. Krishnaswami Rai Sahib, Sales Officer, Mysore Iron Works (Bombay) Mr. Ramanath Chopra, Personal Assistant to the Director of Industries, Punjab (Lahore), Mr. Munnalal Madanlal (Benares), and the Superintendent of the Cottage Industries, Bihar and Orissa (Patna), and also Mr. C. Rajagopalachar, for kindly giving me letters of introduction to some of his friends in Benares.

Lastly, to Mr. Narayana Rao Naik who accompanied me throughout

3 - MAR 1928
DEVELOPMENT & PLANNING DEPARTMENT

my tour and helped me a great deal in my investigations.

Sd/- V. M. Appadhorai Mudaliar,

Asst. Superintendent of Sericulture
in charge of Filature, Mysore.

Copy

H. S. Lawrence
Superintendent of Sericulture
in mysore, Mysore.

3 - MAR 1928

CONFIDENTIAL.

List of addresses of the silk merchants with whom I had interview during my Northern India deputation.

1. Bangalore. - (1) Mr. B. Viswanath Gupta, Silk Merchant and Commission Agent, Avenue Road, Bangalore City.

(2) Messrs. D.T. and Brothers, 426 Nagarthpet, Bangalore City.

2. Hyderabad State-(1) Mr. Kylasa Sarabhayyagaru, Tobacco Bazar, Secunderabad.

(2) Messrs. Narayana Vithoba Venkanna, Manufacturers of silk saries & Shervani cloth.

3. Sangareddi (Hyderabad, Deccan). -

(3) Messrs. Macherla Ramanna Shiva Chidambariahgaru, Pan Bazar, Secunderabad.

(4) Messrs. Sree Lakshminarayanaswamy Gumiocl[illegible] Lakshminarayangaru, Yarn Merchants, Shop No. 1845, Tobacco Bazar.

4. Secunderabad. - Aurangabad. -

(1) Mr. Fitri Mahomed Vazir Abdul Gani, Navapur, Aurangabad.

(2) Mr. Mahomed Thaher Hajee Mahomed Lateef, Mushru and Himru Merchant, Navapur, Aurangabad.

(3) Mr. Mahomed Vazir Mahomed Habeeb, Mushru Merchant, Navapur, Aurangabad.

5. Bombay Presidency. -

(1) Mr. Yemosa Dongarsa Kabadi, Javali Dalal, Betgiri, Gadag.

(2) Mr. Narasingasa Bhojasa Ladwa, Silk Merchant, Gadag.

(3) Mr. Bhavanisa Dharmasa Kabadi, Betgiri, Gadag.

(4) Mr. Hampoosa Dharmasa Kabadi, Betgiri, Gadag.

(5) Mr. T.T. Pujari, Hubli.

(6) Mr. Gangasa Tuljappa Pujari, Hubli.

(7) Mr. Babanosa Subbanasa Powar, Hubli.

(8) Tukkaramsa Venkoosa Jituri, Hubli.

(9) Mr. Gangadharappa Bhimappa Divte, Hubli.

Messrs.

RECEIVED

46

(10) Messrs. H.G. Divte & Sons,
Hubli.

(11) Mr. Narasappa Gangadharappa Divte,
Hubli.

(12) Mr. Vagusa Pavar,
Hubli.

(13) Mr. Ganoosa Nagasa Shalagar,
Shahapur (Belgaum).

(14) Mr. Annappa Nanappa Lengode,
Shahapur (Belgaum).

(15) Mr. Gunda Baba Tilve,
Shahapur (Belgaum).

8. Sangli. - (1) Gajananda Weaving Mills,
Proprietor, Mr. Vishnupant, Sangli.

9. Poona. - (1) Mr. Tarakchand Ramanath,
Ravivarpet, Poona (Kapadganj).

(2) Mr. Sayabana Gunda,
785 Oldganj, Poona.

(3) Mr. Bhurchand Asgram,
Poona.

10. Bombay. (1) Messrs. Nagindas Foolchand Chinai,
Jumma Musjid Street,
Mandvi Post, Bombay.

(2) Messrs. Atmaram Bhukenwala Brothers,
Hosiery Merchants,
78 Jackeri Musjid, Bombay.

(3) The Eastern Hosiery Works, West of
Grant Road Station,
Near Old Post Office, Bombay 7.

(4) Mr. Dhanamal Chettgram,
62/64 Medow's Street, Fort, Bombay.

11. Surat. - (1) Mr. Prabhudas Gangadas Reshamvala,
Rampura Road, Surat.

(2) Mr. B.M. Kharwar, Limboda Chock,
Surat.

(3) Mr. Chimanlal Gulabdas,
Atmaram Bhukhen's Street,
Surat.

(4) Mr. Kahandas Brijwalabhdas,
Haripura Dakal Post, Surat.

(5) The Gold and Silver Thread Works Co.,
Begampura, Kadwali Street, Surat.

(6) Mr. Narayandas Purushotamdas Ghooswala,
Rampura, Surat.

(7) Mr. Ichharam Ranchod,
Nawapura, Golwad, Surat.

(8) Mr. Gopaldas Tricumdas Chevli,
Begampura, Chevli Street, Surat.

(9) Mr. R.T. Patel,
Begampura, Duoharasheri, Surat.

(10) Mr. C.C. Choksy,
No. 339 Bhulamodi Chakla, Surat.

(11) Messrs. M.C. Choksy and Co.,
339 Bhulamodi's Chakla, Surat.

(12) Mr. Kalidas Tricumdas Chevli,
Begampura, Chevli Street, Surat.

(13) Mr. Kaikhushro S. Joshi,
Turkiwad, Surat.

(14) Mr. Patel Kalidas Hargovandas,
Mahidharpura, Charkhona Chakla, Surat.

(15) Mr. Khatari R.G. Bandaria,
Sagrampura, Main Road, Surat.

(16) Mr. Reshamvala Khushaldas Jacvandas,
Navapura Bhat's Pith, Surat.

(17) Mr. Seth Harakhchand Tapidas,
Navapura, Bhat's Pith, Surat.

(18) Mr. Jarivala Magaalal Balabhai Dudhara Sheri,
Begampura, Surat.

(1) Mr. J. Krishnadas Nathabai,
Near No. 80, Swami Narayan Mandir, Baroda.

(2) Mr. Maganlal Chotatlal,
Near No. 80, Swami Narayan Mandir, Baroda.

(3) Mr. Khatri Jamnadas Moolji,
Ladvada Khatri Pole, Baroda.

(1) Mr. R.B. Chinai,
Chinai Bhuban, Khajuri Pole, Ahmadabad.

(1) The Kashmir Weaving Factory,
Amritsar.

(2) Messrs. Kusliram Hansraj and Sons,
Hall Bazar, Amritsar.

(3) Messrs. Shahzadahnand and Sons,
Bazar Sabonyan, Amritsar.

(4) Mr. Beharilal Rattanchand,
Hathi Gate, Amritsar.

(5) Nationals, Ltd.,
Ludhiana.

(6) Mr. A.N. Sayal, B.A.,
Ludhiana.

(7) Benjamin Weaving Factory,
Ludhiana.

(1) Mr. Chotey Ullah Buksh,
Sipat Bazarm Meerut City.

(2) Mr. ~~Nainder~~ Naider Mull Tippu Mull,
Bankers, Jumma Musjid, Mahia Mahal, Delhi

(3) Mr. Umal Khan,
Ballimaram, Delhi.

(4) Mr. Mahomed Yoonus Gaddan Mian,
Haveli, Kalla Khawas, Chitha Qubar,
Delhi.

(5) Mr. Devidas Chunilal,
Nai Mandi, Agra.

(6) Mr. Brijpaldas Mukundlal,
Thatheri Bazarm Benares City.

(7) Mr. Munnalal Madanlal,
Lakhi Chontra, Benares City.

(8) Mr. Haji Sanaulla Amirulla,
Bakarabad Thana Jetpur, Benares City.

(9) Messrs. Rasiklal Sircar & Brothers,
Takhi Chontra, Benares City.

(10) The Indian Stores,
Chowk, Benares City.

20. Bihar and Orissa Presidency.

(1) Rai Bahadur Radakrishna Galan,
Patna.

21. Calcutta (Bengal Presidency). -

(1) Mr. N. Kitazava, Manager,
The Indo-Japanese Commercial Museum,
Calcutta.

(2) Mr. Suchi Ram Ghanshyamdas,
Calcutta.

22. Madras Presidency.- (1) Messrs. Muppanna Somaraju Veeraraju,
Proprietors, Sree Lakshmi Silk
Manufacturing Works, Peddapuram,
(Godavari District).

(2) Messrs. V. Venkoosa and Brothers,
105 Arya Mudali Street,
Chintadripet.

23. Madras. (3) The India Gold-Thread Mills, Ltd.,
54 Konur Road, Perambur, Madras.

Sd/- V.M. Appadhorai Mudaliar,
Asst. Superintendent of Sericulture
in charge of Filature.

****

" C O P Y."

H.S. Lawrence

Superintendent of Sericulture
in Mysore, Mysore.

Proceedings of the Govt of H.H.
the Maharaja of Mysore.

Read -

G.O. No.D.7925-7/Seri. 2-26-5 dated 16th March 1927 sanctioning the deputation of Mr. V.M.Appadhorai Mudaliar now Assistant Supdt. of Sericulture to Northern India to investigate the prospects of introducing Mysore silk in the principal silk centres there.

2. Letter No.D4 - 328-27 dated 7th November 1927 from the Director of I & C forvarding the report of work done by Mr. V. M. Appadhorai Mudaliar during the period of his deputation.

Order No.D. 8483-5/Ser 27-2 Bangalore. Dated, Bangalore, 13th Oct. 1928.

R e c o r d e d.

Mr. V. M.Appadhorai Mudaliar has presented an interesting and valuable report, which embodies the results of a careful, first-hand study of the Indian market for silk.

The Director of I & C is requested to arrange for the necessary number of copies of the report being printed at the Government Press and circulated amongst the members of the Board of I & C. A few copies may also be sent to the Central Silk Association.

The Board of I & C is requested to consider the report at ~~its next~~ an early meeting and to constitute if deemed advisable, a special committee for bestowing steady and continuous attention to sericultural problems. This Committee might, if constituted,

p.t.o.

consider the issues raised in Mr. Appadhorai Mudalair's report one by one, and suggest practicable courses of action, availing itself of the co-operation of the Central Silk Association.

Secy. to Govt. Dev. Deptts.

To

The Director of Industries and Commerce.

The Secretary, Economic Conference.

The Superintendent, Government Printing.

PROCEEDINGS OF THE GOVERNMENT OF HIS HIGHNESS THE MAHARAJA OF MYSORE.

Read:—

Government Order No. P.7325-7/Seri. 2-26-5 dated 16th March 1. sanctioning the deputation of Mr. V. M. Appadhorai Mudaliar now -- Assistant Superintendent of Sericulture, to Northern India to investigate the prospects of introducing Mysore silk in the principal silk centres there.

2. Letter No.D_4- 328-27 dated 7th November 1927 from the Director of Industries and Commerce forwarding the report of work done by Mr. V. M. Appadhorai Mudaliar during the period of his deputation.

Order No. P. 483-5 /Seri 55-27-2

Dated, Bangalore, 13th February 1928.

R e c o r d e d.

Mr. V. M. Appadhorai Mudaliar has presented an interesting and valuable report which embodies the results of a careful, first hand study of the Indian market for silk.

The Director of Industries and Commerce is requested to arrange for the necessary number of copies of the report being printed at the Government Press and circulated amongst the members of the Board of Industries and Commerce. A few copies may also be sent to the Central Silk Association.

The Board of Industries and Commerce is requested to consider the report at an early meeting and to constitute if deemed advisable, a special committee for bestowing steady and continuous attention to sericultural problems. This Committee might, if constituted, consider the issues raised in Mr. Appadhorai Mudaliar's report one by one, and suggest practicable courses of action, availing itself

of the co-operation of the Central Silk Association.

Secretary to Government,
Development Departments.

To

The Director of Industries and Commerce in Mysore.

The Secretary, Economic Conference, Bangalore.

The Superintendent, Government Printing.

No D 8486

To

The Director of Industries
Commerce in Mysore.

Sir,

With reference to your letter No.D_4 328-27 dated 7th November 1927 submitting the report of work done by Mr. V. M. Appadhorai Mudaliar during the period of his deputation to Northern India and suggesting that the Govt. of Hyderabad be moved to forego the duty of 5% levied on silk imported into that State, I am directed to state that Govt. do not consider it practicable to take ~~further action~~ any action on the suggestions, for the present.

It is seen from Mr. Appadhorai Mudaliar's report that Mysore silk does not appear to have much chance of acceptance outside unless its price is reduced. I am therefore to request you to take effective ~~steps to enable the local silks~~ measures to reduce the cost of production to compete successfully with its rivals in and outside the State.